USER INSTRUCTIONS

ORDERING ADOBE FORM DESIGNER

The Adobe Form Designer software may be licensed from Four Point Solutions (613-769-3109) on the State Contract Number PD1787. The licensing cost is $400.00 and the optional maintenance is $75.00 a year. The other alternative is to license (or upgrade to) the Adobe Acrobat 7.0 Professional, which will include the Forms Designer (now called LiveCycle Designer). If your agency already has Adobe Acrobat 6.0 Professional (or 5.0) the upgrade cost should be about $90.00. For further information on licensing software, e-mail Elaine Oaks at EOAKS@utah.gov.

HOW TO DEPLOY

To deploy a form to the Adobe Form Server, e-mail your request to AdobeForms@utah.gov with the following information:

- Name
- Department
- Agency
- Phone Number
- DAS Code
- Title of the Form to be Deployed
- Date the Form Must Be Active
- E-mail Addresses of Those to Be Notified When an End User Submits the Form

Attach the .XDF version of the form to your request. This is the version of the PDF file converted by the Form Designer.

SAVING YOUR FORM LOCALLY

If you Save an open form to your PC, the form will be saved without any of the data you have entered. If you wish to save the form with your data, you must first submit the form by clicking on the Submit button. You will then be informed that your form was submitted and you will be presented with a link to view the form. If you click on the link, the form will once again be presented to you with your data. Now you may Save the form to your PC and have your data saved with it.

DIVISION OF INFORMATION TECHNOLOGY SERVICES
6000 State Office Building
Salt Lake City, Utah 84114
Phone: 801-538-3833
FAX: 538-3622

ITS CUSTOMER SUPPORT
801-538-3440 or 800-678-3440
http://its.utah.gov/services/support/helpdesk.htm

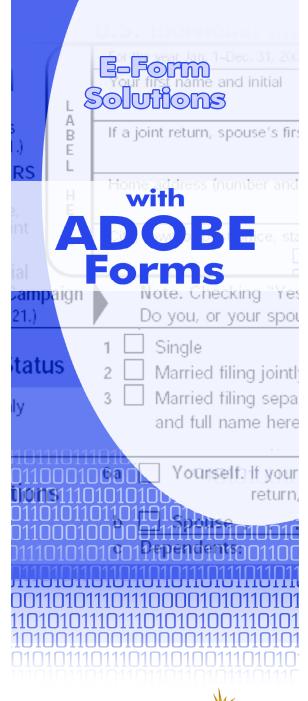### ITS INTERNET SITE
http://its.utah.gov

Utah!

Where ideas connect

E-Form Solutions

with
ADOBE Forms

ITS Customer Driven Technology
Information Technology Services

DB Connectivity

Adding database connectivity to a form provides greater form intelligence. Databases can pre-fill data fields, provide data for drop-down lists, and verify the validity of entered data. Forms using UMD authentication serve as an example. When the user opens the form, the user's name, address, department, division, etc., can fill appropriate fields. Doing so streamlines the work the user must do and improves accuracy.

Adobe Forms has two ways to connect backend databases to a form.

1. On the client side, using the Form Designer. Database connectivity is done on the end-user's machine. The user must have an ODBC connector and access to the database. In circumstances where users are within the firewall and have access to ODBC, this is an easy solution. However, when this is not the situation, the second solution must be used.
2. Making database connections from the Adobe Form Server. The form is served to the user with the connectivity already available. While more technical assistance is required, it meets the needs of a wider group of form users. Additional technical support can be obtained from ITS.

Digital Signature

To digitally sign a document, a user must either have the full version of Adobe Acrobat (not just the free Acrobat Reader), or use the Adobe Document Server for Reader Extensions software to enable the form to allow digital signatures from the free Acrobat Reader. This functionality is dormant in the Reader until "turned on" by the form. Once activated, a user can apply a digital signature. The user must also have a digital signature certificate before signing the document. Since most users do not have a certificate, requiring a digital signature is not practical for most form applications. Digital certificates may be obtained using industry-standard public key infrastructure (PKI) technologies—either via in-house PKI solutions, or using services from Entrust, VeriSign, and others. The cost of a personal digital certificate is approximately $25.00 per year.

The cost of the extra software required to enable the form for a digital signature can be expensive—as much as $5,000 per form. However, some organizations have found other ways to verify a user's authenticity and provide a legally binding document. The IRS allows taxpayers to submit its 1040 tax form electronically by providing a PIN to the user. To receive the PIN, the user must provide specific information only they know.

Document Management

ITS is investigating an Enterprise Document Management (EDM) system for the State. Some agencies already employ document management software, while others find it too expensive. ITS will conduct Needs Analysis to determine if there is enough interest to warrant hosting such a product.

Document management provides a means to capture, categorize, catalog, and group documents of all types into logical folders, and then retrieve them. A Retention Management module further provides and applies retention policies to documents and allows off-line storage, completing the Document Life Cycle process. Vendors may provide sophisticated collaboration capabilities for sharing and reviewing.

Bar Code

The major cost of receiving forms via mail or fax is that of keying the information so it can be captured and used in the agency's business processes. Manual keying of data is not only time-consuming, but increases error. However, some forms absolutely require a "wet" signature for validity (perhaps dictated by statute). This is where the bar-coded paper-form provides a solution. The user downloads a form enabled for the Adobe Bar Code. As the form is filled in, a bar code is created which contains the information, encoded. When finished, the user prints the form, signs it, and either mails or faxes it to the agency. The agency receives the form with the required wet signature and then uses a bar code scanner to capture the data from the bar code. The data is then available for the backend processes without the need for manual keying. To enable a form to create a bar code, additional software must be licensed on a form-by-form basis. However, one license enables the form for an unlimited number of users without a time limit.

PDF Security

The Form Client supports forms covering simple to complex security needs, from safeguarding the original template from tampering to digitally signing captured information. Form data may be encrypted and then decrypted. Policies may also be embedded within a form to set an expiration date after which the form becomes obsolete. These policies may apply whether the form is on or off-line. If you have an interest in the Adobe Policy Server product, access www.adobe.com, or phone Jack Pferdner at 801-538-3672.

Saving to the Desktop

When a form is opened using the free Adobe Reader, a user may enter data onto the form and print the form. However, if the form is saved locally to the user's desktop, only the static form is saved, not the data. To allow the Adobe Reader to save a form with the data the form must be enabled with Adobe Reader Extensions software. This software, while expensive, allows the user to partially enter data, save the form, and then fill out the remainder of the form at a later time. Reader Extensions also enables any end user to annotate and sign the document. Because of the extra charge per enabled form, the expense must be justified. ITS provides a way to save a form locally, with the data, without the use of Reader Extensions. This method requires the form to first be submitted and then viewed again by the user. At that point the form and the data can be saved to the user's PC for archival purposes.

UMD Integration

Forms may be either public facing or protected by user authentication. ITS can host either type. For forms requiring authentication using Siteminder and the Utah Master Directory (UMD) there is the added benefit of pre-populating fields requesting information already stored in UMD. Fields such as the user's name, address, department, division, phone, etc., can be completed without manual input. The designer of the form must indicate the UMD information and the fields to be pre-populated. This saves the user time and improves accuracy.

Workflow

Each form may be associated with specific steps that it follows after submission. These steps may include review for completeness and accuracy, approval by one or more managers, and then fulfillment of the request. The Adobe Workflow Server is designed to move the form through these business processes and speed delivery of requests and services. Adobe will replace its Workflow engine with a J2EE compliant version scheduled for release in early 2005. ITS will not pursue the old version, but will beta test the new Workflow as soon as it is available, and keep you informed on its availability.

Training

ITS is working with the Division of Purchasing to obtain a State contract for training services for the Adobe LiveCycle Designer (formerly the Adobe Form Designer). Once a contract is in place, ITS will determine a cost per person and the maximum number of attendees per class, and will accept applications. Every effort will be made to provide enough classes to accommodate all wishing to attend. Each attendee must have a licensed copy of the Form Designer prior to attending the class.

ITS Support Services

ITS will have trained form designers on staff to either assist agencies in their form conversions or provide complete form design for those not wishing to have one of their staff trained. These support services will include the following:

- Conversion of Existing PDF Forms to the Forms Designer
- Form Design
- Database Connectivity and Support
- Integration with UMD
- Workflow Design and Support
- Problem Resolution
- Backend Database Integration

These services are available at the approved rate of $75.00 per hour on a first come, first served bases.